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Sharing Agreement Category Update

Introduction

This option allows the user to define subcategories for appointment types and assign them an active status. Each appointment type may have multiple subcategories. You may associate subcategories with any appointment type but the intent of this option is to do so for the “sharing agreement” appointment type.

This information is utilized at the site level only and is not transmitted to a national database.

Example

```
Select APPOINTMENT TYPE NAME: SHARING AGREEMENT
Select SHARING AGREEMENT SUB-CATEGORY NAME: DOD
  Are you adding 'DOD' as
    a new SHARING AGREEMENT SUB-CATEGORY (the 1ST)? Y (Yes)
SHARING AGREEMENT CATEGORY ACTIVE: 1 YES
```

ACRP Database Conversion

Introduction

This option has been exported as a stand-alone option to be run by IRM in consultation with the Scheduling Supervisor **or** assigned to the Scheduling Supervisor to be run in consultation with IRM.

The purpose of the database conversion is to convert old Scheduling encounter information into the Visit Tracking/Patient Care Encounter (PCE) database. Scheduling encounters include appointments, add/edits, and dispositions. All data from 10/1/96 on is already part of the PCE database and does not need to be converted. This one option provides the functionality necessary to accomplish all aspects of the database conversion.

The conversion is accomplished by creating Conversion Specification Templates (CSTs). They contain the user-specified criteria that defines a set of records (based on a time frame) to be converted from the current file structure to the new file structure. The CST also maintains an error log and an event log for conversion-process tracking.

There are 3 functions (or events) relating to the CST.

Estimate - Determines amount of disk space the conversion will take. Estimating is not mandatory. Once you've started the conversion, you cannot go back and estimate.

Convert - Actually converts the data into PCE files.

Cancel - Once canceled, no further action can be taken against a CST. However, another CST can be created that includes the same time frame.

Once the event has started, the actions shown on the CST Master List screen will go from "queued" to "started" to "completed" without user intervention. If the task never starts, contact IRM Service to find out why.

The templates listed on the CST Master List are in date range order. When one is added, it will be placed on the list in date order. The asterisk (*) before a date range indicates there is a gap between that date range and the entry preceding it.

ACRP Database Conversion

Introduction

Parameters

The following ACRP Database Conversion parameters are set through the Display/Edit Parameters action.

EARLIEST ENCOUNTER DATE

This field contains the earliest allowable date to convert encounters (cannot be before 10/1/80). For example, if 1/1/86 is entered in this field, encounters before 1/1/86 cannot be converted via the encounter conversion utilities. Additionally, all data from this date through 9/30/96 must be converted before the database conversion at your site can be designated as complete.

LIMIT CONV RANGE TO 1 YEAR: NO// (0 or NO; 1 or YES)

Set this field to YES if you wish to limit the Scheduling conversion date range for a CST to a maximum of 1 year.

DEFAULT DISPOSITION CLINIC

If a valid disposition clinic cannot be determined for the division, this field contains the pointer to the disposition clinic that will be used for the conversion of dispositions.

MAXIMUM ERRORS ALLOWED: 1000//

If a CST produces this number of errors in the CST Error Log, processing of the conversion for the template will be stopped. If this field contains no value, the system will use 1000.

DISPLAY CANCELLED TEMPLATES: NO// (0 or NO; 1 or YES)

This parameter determines whether or not cancelled CSTs are included in the list of templates displayed while using the ACRP Database Conversion option.

ACRP Database Conversion

Introduction

DATE CONVERSION COMPLETED (date)

This is the date the entire conversion has been completed at your site. After this date has been entered, no more CSTs can be run. You will only be allowed to make an entry at this parameter when all CSTs are either completed or canceled and when the date range from the earliest encounter date through 9/30/96 has completed conversion.

DATE DELETION COMPLETED (date)

This is the date the last of the following files were deleted from the system.

- OPC (#40.1)
- OPC ERRORS (#40.15)
- SCHEDULING VISITS (#409.5)
- OUTPATIENT DIAGNOSIS (#409.43)
- OUTPATIENT PROVIDER (#409.44)

Once this date has been entered, the Scheduling software will no longer check these files for visit data. It will only use the PCE V-files. You will only be allowed to make an entry at this parameter when all CSTs are either completed or canceled.

Actions Available from the CST Master List Screen

Add Template

Used to create a CST. You cannot select a CST start date before 9/1/80. After creating a CST, you can initiate the estimate or convert event. Both events can generate a bulletin when completed - the Scheduling Conversion Global Growth bulletin for the estimate event and the Scheduling Conversion Log bulletin for the convert event. You should answer YES to the "Bulletin Upon Completion" prompt if you wish to be notified when the event has completed.

Edit Template

Used to perform the following: edit whether or not the bulletin is generated; edit date range when estimating; change event to convert after estimating. Can't edit CST dates once conversion is started.

Schedule/Stop Event

Start, restart, or stop the current conversion event through this action.

ACRP Database Conversion

Introduction

Cancel Template

Used to cancel a CST. You may wish to cancel if estimating showed the selected date range as too large. Once the selected date range has completed converting, the CST cannot be canceled. Even though a CST has been canceled, another CST may be created for the same time frame.

View Template

May display conversion data such as template date range, estimate results, last event, last action request, and estimated global growth.

Mail Estimate Bulletin

Used to get a copy of the estimate bulletin without rerunning the estimate. Goes to the user and whoever has made a request to schedule/stop the event.

Refresh List

Used to refresh the screen and update the list with the most recent event status.

Estimate Summary

Used to obtain a copy of the estimate summary. Categories include global block growth, new entries, modified entries, and global block estimates per entry. You may print the summary to include each CST individually (answer YES to CST detail). This summary should be used by IRM to help plan disk space requirements.

Display/Edit Parameters

Used to enter/edit the database conversion parameters. Some of these include setting the earliest allowable date to convert encounters and limiting the conversion range to one year.

Convert Single Visit

Used to convert a single visit. The visit may be selected from available records by encounter, disposition, appointment, or standalone add/edit. Identifying information will be displayed for each selection to ensure you have selected the correct visit.

ACRP Database Conversion

Introduction

Delete Old Files

Once you have converted all the data, you may wish to delete the old Scheduling files. A list of the files which may be deleted will be displayed when selecting this action. It is recommended you back up these files before deletion. All data from your "earliest date to convert" to 9/30/96 must be converted (with no gaps) before these files can be deleted.

Actions Available from the CST Detail Screen

The CST Detail Screen is reached by utilizing the View Template action on the CST Master List Screen. No template selection is necessary for these actions as the template has already been selected.

Edit Template

Same as on the CST Master List screen.

Schedule/Stop Event

Same as on the CST Master List screen.

Cancel Template

Same as on the CST Master List screen.

Action Request Log

Prints a list of requests taken against the CST. Includes request date/time, action, event, start date/time, stop date/time (will only appear if an entry was made at the stop date/time prompt), and user.

Error Log

Prints a list of errors for a selected CST. Includes error code number and error text.

Event Log

Prints a list of events for a selected CST. Includes event date/time, status, event.

Mail Estimate Bulletin

Same as on the CST Master List screen.

ACRP Database Conversion

Example

Adding a Conversion Specification Template (CST)

CST Master List Oct 12, 1998 09:12:15 Page: 1 of 1
 Conversion Specification Templates [CST]
 Full Conversion Date Range: Oct 01, 1980 - Sep 30, 1996

| List # | Date Range (*=gap) | Last Event | Status | Template # |
|--------|------------------------------|------------|-----------|------------|
| 1 | Jan 01, 1995 - Jan 01, 1995 | CONVERT | QUEUED | 1 |
| 2 | Jan 02, 1995 - Jan 02, 1995 | CONVERT | PENDING | 4 |
| 3 | *Feb 01, 1995 - Feb 01, 1995 | CONVERT | COMPLETED | 5 |
| 4 | *Mar 01, 1995 - Mar 01, 1995 | ESTIMATE | QUEUED | 3 |
| 5 | *Oct 25, 1995 - Oct 25, 1995 | CONVERT | COMPLETED | 7 |
| 6 | *Jan 01, 1996 - Jun 30, 1996 | ESTIMATE | COMPLETED | 6 |
| 7 | *Jul 01, 1996 - Sep 01, 1996 | CONVERT | COMPLETED | 2 |

```

Enter ?? for more actions
Add Template      View Template      Display/Edit Parameters
Edit Template     Mail Estimate Bulletin  Convert Single Visit
Schedule/Stop Event Refresh List      Delete Old Files
Cancel Template   Estimate Summary      Exit
Select Action: Quit// add Add Template
SCHEDULING CONVERSION SPECIFICATION TEMPLATE START DATE:  6 1 95
(JUN 01, 1995)
SCHEDULING CONVERSION SPECIFICATION TEMPLATE END DATE:  6 30 95
(JUN 30, 1995)

*** Template #8 6/1/95-6/30/95 has been added.
```

```

EVENT: Estimate// CONVERT
Do you want to schedule this event to run?: YES// <RET>
```

```

Requested Event      : CONVERT
Last Event Status    : PENDING
Last Requested Action: <No action requested>
```

```

BULLETIN UPON COMPLETION: YES// n NO
Logging request ...
START DATE/TIME: OCT 12,1998@09:14:09// <RET> (OCT 12, 1998@09:14:09)
STOP DATE/TIME: <RET> (Task: #206588).....
```

ACRP Database Conversion**Example**

CST Master List Oct 12, 1998 09:12:15 Page: 1 of 1
 Conversion Specification Templates [CST]
 Full Conversion Date Range: Oct 01, 1980 - Sep 30, 1996

| List # | Date Range (*=gap) | Last Event | Status | Template # |
|--------|------------------------------|------------|-----------|------------|
| 1 | Jan 01, 1995 - Jan 01, 1995 | CONVERT | QUEUED | 1 |
| 2 | Jan 02, 1995 - Jan 02, 1995 | CONVERT | PENDING | 4 |
| 3 | *Feb 01, 1995 - Feb 01, 1995 | CONVERT | COMPLETED | 5 |
| 4 | *Mar 01, 1995 - Mar 01, 1995 | ESTIMATE | QUEUED | 3 |
| 5 | *Jun 01, 1995 - Jun 30, 1995 | CONVERT | QUEUED | 8 |
| 6 | *Oct 25, 1995 - Oct 25, 1995 | CONVERT | COMPLETED | 7 |
| 7 | *Jan 01, 1996 - Jun 30, 1996 | ESTIMATE | COMPLETED | 6 |
| 8 | *Jul 01, 1996 - Sep 01, 1996 | CONVERT | COMPLETED | 2 |

| Enter ?? for more actions | | |
|---------------------------|------------------------|-------------------------|
| Add Template | View Template | Display/Edit Parameters |
| Edit Template | Mail Estimate Bulletin | Convert Single Visit |
| Schedule/Stop Event | Refresh List | Delete Old Files |
| Cancel Template | Estimate Summary | Exit |
| Select Action: Quit// | | |

ACRP Database Conversion

Example

Estimate Bulletin

Subj: Scheduling Conversion Global Growth for 01/01/1996 to 06/30/1996

[#3798] 13 Feb 98 07:31 25 Lines

From: SCHEDULING CONVERSION GLOBAL ESTIMATOR in 'IN' basket. Page 1 **NEW**

Template #: 21

Total # new entries expected:

Encounters : 909

Visits : 909

V Providers : 0

V POVs : 0

V CPTs : 0

Total # encounters to convert:

Add/Edits : 0

Ancillaries : 0

Appointments: 626

Credit Stops: 178

Dispositions: 105

| ESTIMATED GLOBAL BLOCK GROWTH | | | | |
|--|----------|----------|----------|----------|
| 1/1/96 - 6/30/96 | | | | |
| SCE | AUPNVSIT | AUPNVPRV | AUPNVPOV | AUPNVCPT |
| 262 | 305 | 0 | 0 | 0 |
| ** The estimate algorithm factors in global ** pointer data and data requirements (including ** cross references) at a 70% efficiency level ** Each block represents 1024 bytes. ** SCE Example: 262 x 1024 = 268,288 bytes. ** | | | | |

Select MESSAGE Action: IGNORE (in IN basket)//

ACRP Database Conversion

Example

Conversion Bulletin

Subj: Scheduling Conversion Template #7 - Event Completed [#3864]
18 Feb 98 09:19 12 Lines
From: POSTMASTER (Sender: BAILEY,CARL E) in 'IN' basket. Page 1 **NEW**

The conversion event has been 'Completed'.

Conversion Event: Convert

Conversion Start Date: JUL 01, 1996

Conversion End Date: SEP 01, 1996

encounters - converted: 73444

- not converted: 2

Total # of errors logged : 2

2 errors were encountered during this conversion run. Please see the CST
Error List for details.

Select MESSAGE Action: IGNORE (in IN basket)//

ACRP Database Conversion

Example Estimate Summary

| | | | | | |
|----------------------------------|-----------------------|------------------|--------------|--------------|----------------|
| Estimate Summary | Dec 11, 1998 09:25:12 | | | Page: | 1 of 1 |
| | SCE | AUPNVSIT | AUPNVPRV | AUPNVPOV | AUPNVCPT |
| Global Block Growth | | | | | |
| Total Blocks | 263,194 | 329,895 | 18 | 9 | 11,845 |
| (Grand Total: 197) | | | | | |
| New Entries | | | | | |
| Total Entries | 1,684,065 | 1,963,679 | 261 | 117 | 120,877 |
| Modified Entries | | | | | |
| Total Entries | 279,614 | | | | |
| Global Block Estimates per Entry | | | | | |
| New Entries | 0.144 | 0.168 | 0.070 | 0.082 | 0.098 |
| Updated Entries | 0.074 | | | | |

Note: Estimates are assuming the following:
 Block Size: 2048 bytes
 Global Efficiency: 70%

Enter ?? for more actions

Select Action:Quit//

ACRP Database Conversion

Example

Display/Edit Parameters Action

Conversion Parameters Oct 05, 1998 08:20:47 Page: 1 of 1

Earliest encounter date to be converted: <Not Specified>
 Limit CST date range to 1 year or less?: NO
 Default Disposition Clinic: <Not Specified>
 Maximum Errors Allowed: 1000
 Display Cancelled Templates: NO

Date Conversion Completed: * UNEDITABLE - CST entry(s) still active *
 Date Deletion Completed: * UNEDITABLE - CST entry(s) still active *

Enter ?? for more actions
 Edit Parameters Exit
 Select Action: Quit// **ED** Edit

EARLIEST ENCOUNTER DATE: **10 1 80** (OCT 01, 1980)
 LIMIT CONV RANGE TO 1 YEAR: NO// **Y** YES
 DEFAULT DISPOSITION CLINIC: **DISPOSITION ALBANY**
 MAXIMUM ERRORS ALLOWED: 1000// **800**
 DISPLAY CANCELLED TEMPLATES: NO// **<RET>**

Conversion Parameters Oct 05, 1998 08:20:47 Page: 1 of 1

Earliest encounter date to be converted: Oct 01, 1980
 Limit CST date range to 1 year or less?: YES
 Default Disposition Clinic: DISPOSITION ALBANY
 Maximum Errors Allowed: 800
 Display Cancelled Templates: NO

Date Conversion Completed: * UNEDITABLE - CST entry(s) still active *
 Date Deletion Completed: * UNEDITABLE - CST entry(s) still active *

Enter ?? for more actions
 Edit Parameters Exit
 Select Action: Quit//

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